

Thompson School District
The Thompson Schools Improvement Project
Streamline and Consolidate Initiatives Project Status at 10/1/09

Progress Summary

The Streamline and Consolidate initiatives group has been charged with beginning phase two of the project. In phase two, any additional district supported initiatives will be evaluated in the same manner in which the original 13 initiatives were value rated in phase one. At this time, six members of the phase one group will continue with the project. (Todd Ball, Audrie Mergelman, Barb Randall, Paul Banks, Mary Lou Rodgers, Sandy Haire) .The first meeting will take place on October 6 at BRMS.

Work Completed in this Period (9/1 – 9/30)

- Project definition for phase two is complete
- Work plan for phase two is complete
- Phase two group members have been assigned
- Initial meeting has been scheduled

Work Due, Not Complete

- Review outcome of cabinet report with the group
- Produce list of outstanding district supported initiatives beyond the original 13
- Research outstanding initiatives

Plans for the Next Period (through 10/28)

- Compile complete list of initiatives
- Research all initiatives
- Define a day to take initiatives through the value rating process

Management Issues / Admin

- Maintains Consistency - Six of the original phase two members are continuing on into phase two in order to maintain a degree of reliability in the value rating process.

Thompson School District
The Thompson Schools Improvement Project
Project Definition Document

Project: Streamline and Consolidate Initiatives

Phase: Special Analysis Project – Phase II

Project Lead: Todd Ball

Revision History

The following revisions have been made to this document:

| Date | Name | Version | Revisions Made |
|---------|---|---------|---|
| 1/12/09 | Todd Ball, Terry Schueler, Ron Cabrera, Stuart Thomas | 1.0 | Created initial version of project plan |
| 1/19/09 | Team Lead Review | 1.1 | Made minor changes |
| 6/8/09 | Todd, Annette and Stuart | 2.0 | Modify to describe Phase II – Fall '09 |
| 9/8/09 | Todd, Annette and Stuart | 2.1 | Continue to modify Phase II plans |

Background

1. Many initiatives, programs, strategies and projects are underway (~13)
2. Other improvement projects are underway too (e.g., IB, Core, Health & Wellness, Math & Science Focus)
3. Many of the initiatives are good things, but the interrelationships are not fully understood
4. Communication about the purpose of each initiative is limited
5. There is a lot going on. Is there too much going on?
6. The issue may be too many initiatives, or the issue may be oriented around how the initiatives are organized and/or managed
7. In Spring '09 (Phase I), the analysis team evaluated the top thirteen projects. Major conclusions / recommendations were to:
 - Remove CBL, CBM, RtI
 - Develop a process for implementation and evaluation for all future initiatives
 - Expand the pool of initiatives in Phase II (Fall '09) to provide a more comprehensive list
 - Value rate the thirteen (prior) and the entire list of initiatives going into the budgeting cycle

Problem to be Solved: The perceived sense of lack of focus combined (i.e., people are working on many things at once) with the number of initiatives and lack of overall coordination / communication seems inefficient, possibly disconnected and presents a strain on resources.

Guiding Question: Will the streamlining, consolidation and communication of District initiatives increase clarity, strengthen knowledge pathways, and improve our effectiveness to positively impact student achievement? (i.e., do we need to manage differently, let go of something, or combine initiatives)

Objectives:

1. Increase shared vision and clarity of focus
2. Decrease workforce confusion
3. Increase effectiveness
4. Increase efficiencies
5. Improve communication about initiatives

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Project: Streamline and Consolidate Initiatives

Phase II – Fall '09

Scope

The scope of this project includes:

- From Phase I - the 13 original initiatives and apply the 80 / 20 rule
- Include approximately 10 – 15 new initiatives not already evaluated based upon the following criteria:
 - Some level of District support
 - Some form of choice is involved (i.e., not mandated)
- Limited to what is going on already (vs. what could be started)
- District initiated activities (vs. entirely school level (if any))

Not included in this phase (but maybe later)

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Linkages/interfaces with other projects:

- Grant writing – some initiatives originate with grants – some have frontend funding available, but require District funding for sustainability

Approach

This project will be performed in phases. At this time, phases include:

- Phase I – Evaluate the top thirteen District initiatives (Spring '09)
- Phase II- Evaluate the remaining District initiatives (Fall '09)
- Phase III – Design and implementation of an ongoing initiative evaluation and management process (Spring '10)

The following activities will be performed to complete the project and produce the deliverables identified later in this document. They include:

- I. Organize project
- II. Understand current initiatives (including target populations)
- III. Establish evaluation criteria (including cost, sustainability, support, etc)
- IV. Evaluate initiatives
- V. Prioritize initiatives based upon analysis
- VI. Develop action plan to adjust initiatives and evaluate future initiatives
- VII. Report to Cabinet
- VIII. Manage the project (PDCA)

These activities are illustrated in the bar chart below.

Project: Streamline and Consolidate Initiatives
Phase II – Fall '09

Milestones / Project Timing

- ## Assumptions

- ## Deliverables

1. Common definitions of initiatives
2. Research on each initiative
3. Value rating for each initiative in the consolidated list of District initiatives (i.e., from Phase I and Phase II)
4. In conjunction with Cabinet, recommended action plan and rationale for each initiative
5. Plan for Phase III

1. Design for streamlined and consolidated initiatives

Benefits that may result from this and subsequent phases include:

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Project Definition Document

Project: Streamline and Consolidate Initiatives

Phase II – Fall '09

7. Consistently allocate resources within budget constraints

Key Success Factors (KSF)

Factors that are important to project success include:

- As much continuity of the Phase I team as possible
- High level of Cabinet and BOE awareness and involvement
- Clear identification of remaining initiatives at the onset of the project (i.e., early in Sept)

Staffing Needs

- Project Sponsor – Ron Cabrera, superintendent
- Project lead – Todd Ball (approximately 3 – 5 days of work time)
- Prior team members
 - Marylou Rogers
 - Barb Randall
 - Sandy Haire
 - Audrie Mergelman
 - Barbara Long
 - Michelle Malvey
 - Paul Bankes
 - Pamela Rollison

Team Time Estimates

- Research – 2-3 hours / person for assigned initiative (i.e., around 4 – 6 hours/team member)
 - Work sessions - Two two-hour work sessions (i.e., 4 hours/team member)
 - One-day evaluation session – (i.e., 6 hours/team member)
 - Total – Approximately two days/team member
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- Cabinet – for one update throughout the project (assume Todd will present a few more times after November)
 - Financial Dept (Steve Towne) - for actual expenditures-to-date
 - Clerical support

